CLIENT PORTAL V10.25

USER GUIDE

The client portal is a new Synergist external module designed to be accessed by your clients over the internet via a web browser. The system is hosted from your own premises using the built-in 4D webserver. Your clients will be able to log into the Synergist database to see the current status of their jobs and any other data you may have decided to publish. The messaging system built into the portal can be used as in addition to normal email – ensuring key documents and communications are visible to all. Internal staff are sent email alerts when new messages or comments have been entered via the portal. Clients can also create job requests and upload briefs and other documents.

HTTP://KB.SYNERGIST.CO.UK/ARTICLE/AA-00249

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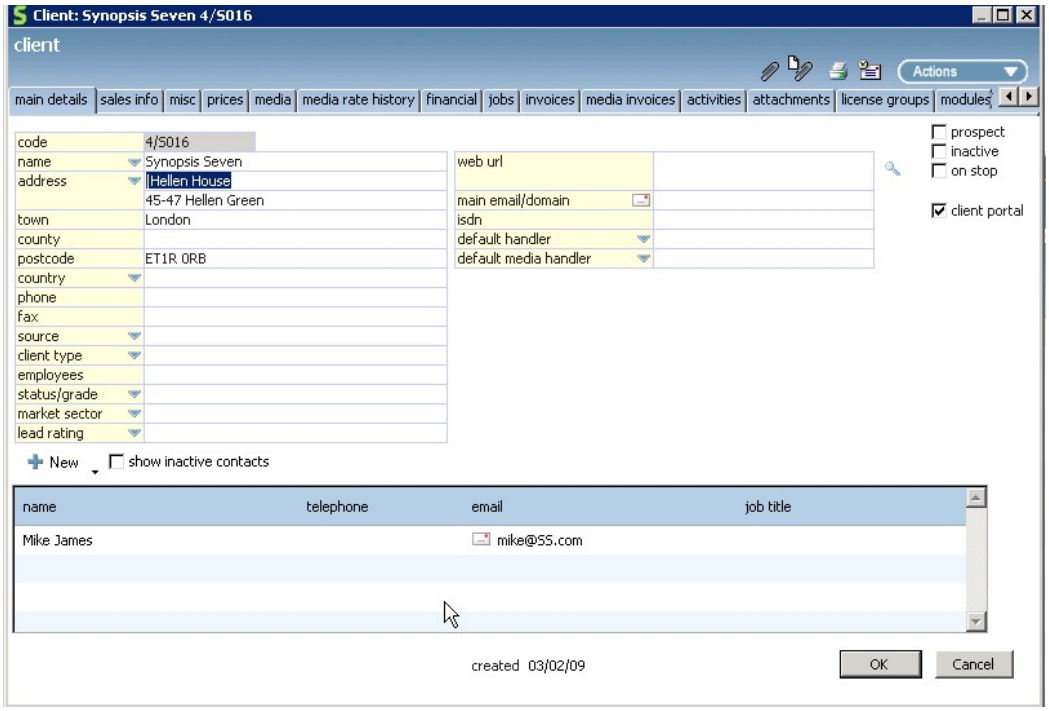
GETTING STARTED

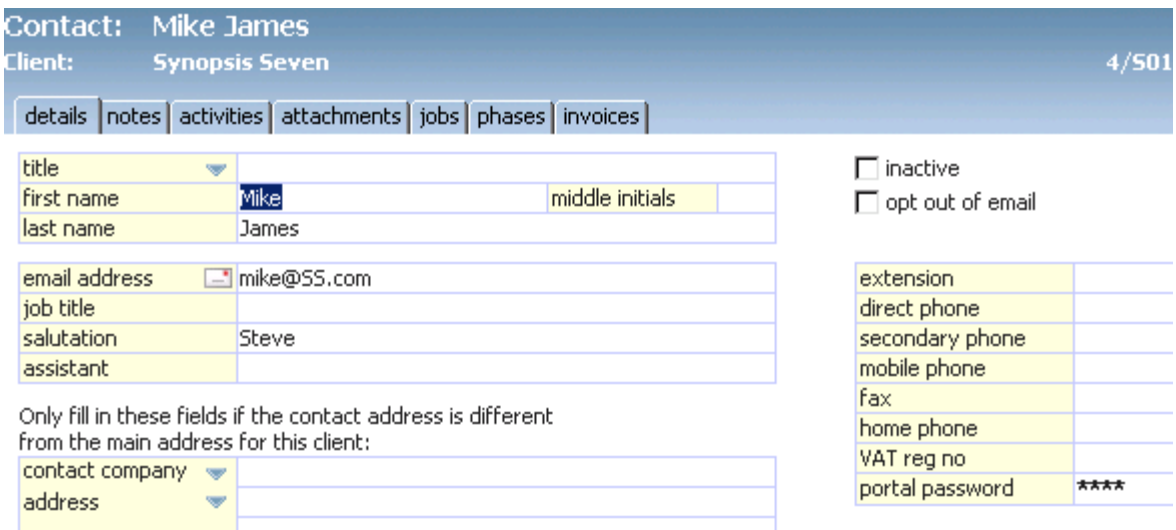
Once the client portal activation key has been applied to your server you will be able to set up individuals for access:

You must first decide which of your clients are to be given access to the portal, and which client contacts need to be able to log in. This can all be done from the client card.

Client card
Notice the “client portal” checkbox has been ticked.



In the client contacts section Mike James has been set up with an email address (this becomes the user id for the portal) and a portal password.



BRANDING

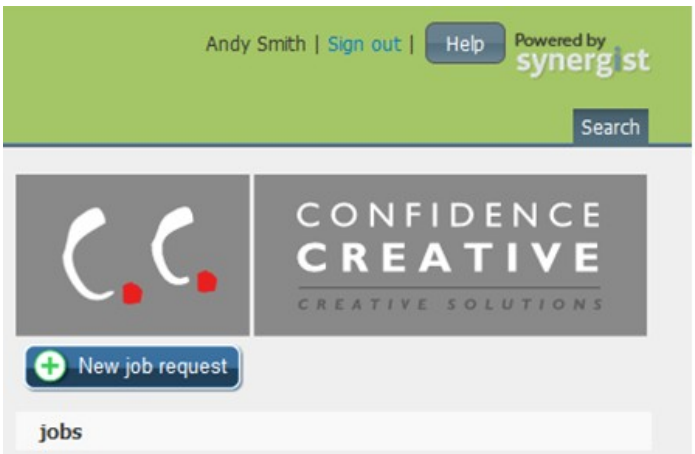
To brand the portal with your own logo simply place your logo on your server.

Place your logo in this location:
..\synergist\html\portal\Custom**system_logo.png**

The logo will then appear in the login screen and on the main dashboard.

Login

Dashboard



LOGGING IN

To access the portal the user will typically type in a special URL (comprising of the external IP address of your Synergist server plus "/clientportal") e.g. <ip address>/clientportal.

The user then simply types in his/her email address and portal password.

Note: Passwords must now be at least 5 characters long.

DASHBOARD

The user will then be presented with client portal dashboard. The dashboard defaults to being a 7 day snapshot of activity occurring on this company's jobs and projects.

The screen is divided in to two main sections:

The left pane

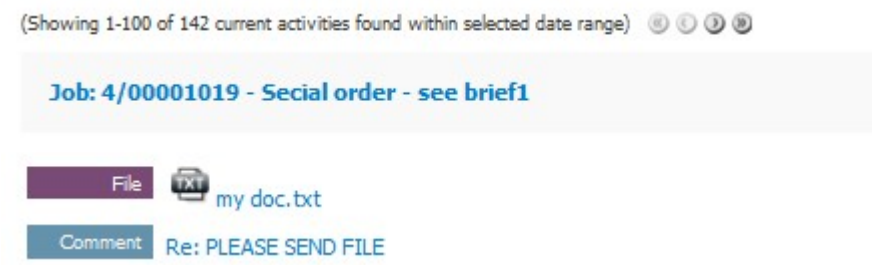
At the very top you will see a list of any new messages or job requests that users have submitted in the past week. Below is a list of activities by job. By selecting form the filter at the top of the screen data from other periods (e.g. for the entire month) can be included in the view.

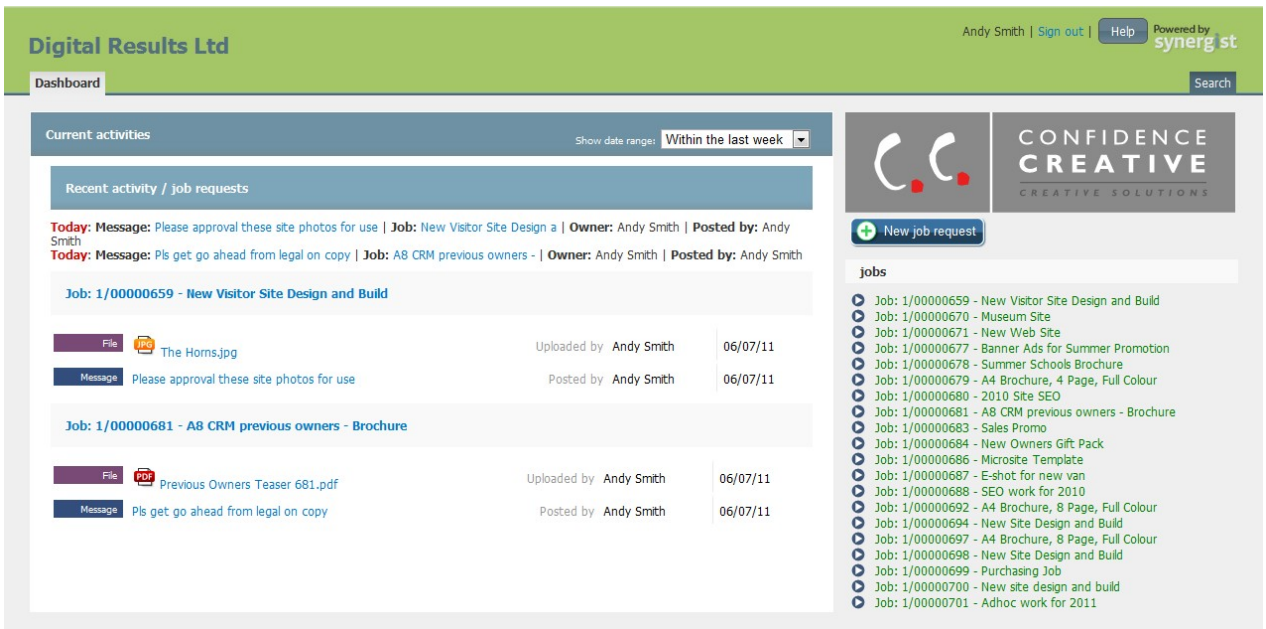
The right pane

The right hand pane displays a list of all current jobs & phases. From here you can navigate to individual jobs to see job details including the current stage. Once you are viewing the job you can create new messages or upload additional files to the job.

Paging

In 10.25 paging was added – useful if you have a dashboard containing more than 100 activities



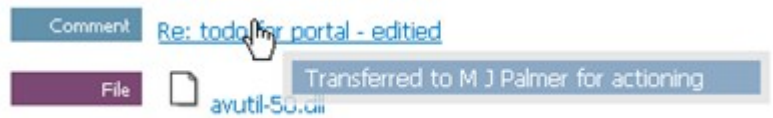


Recent activity area of dashboard
This has been rationalised and now displays the following

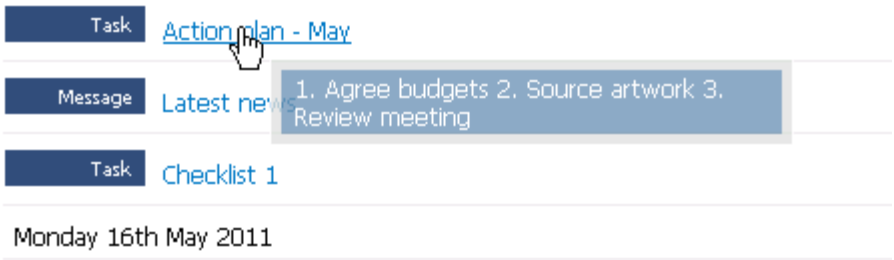
- Open job requests created in the past 7 days
- Messages / Tasks created in the past 7 days
- Older messages were new comments have been added in the past 7 days
- Tasks that have become due/overdue in the past 7 days

Hover text
- Hover text has been added to many of the list items.

Main dashboard display - comments.
- When there are multiple comments against a single message the hover text makes it easy to quickly review the comments.



Recent activity list – messages / activities
- The main text of the message appears as over text



ACCESSING A JOB

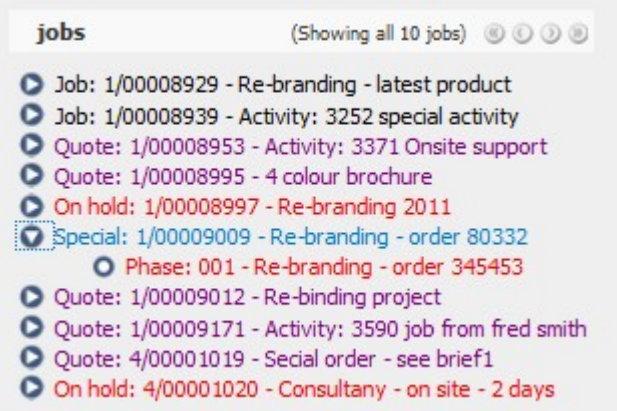
Navigate to the job list in the right hand pane. Clicking either a job or a phase will take you to the job screen.

Colour coding

The job/phase list is colour-coded to indicate the main status of the job:

Note: The colour coding was amended in ver 10.25 to this new format:

Black - Live jobs & phases
Purple - Quote status jobs & phases
Red - On Hold
Blue - Special



PHASES

Navigate to the job list in the right hand pane and you can expand individual jobs to see any phases created on the job. Typically a job may be given additional phases to handle amendments. Clicking either a job or a phase will take you to the job screen.

JOB SCREEN

4 main tabs are visible:

Overview

Messages, comments added to messages, and uploaded files are displayed

Job/phase details

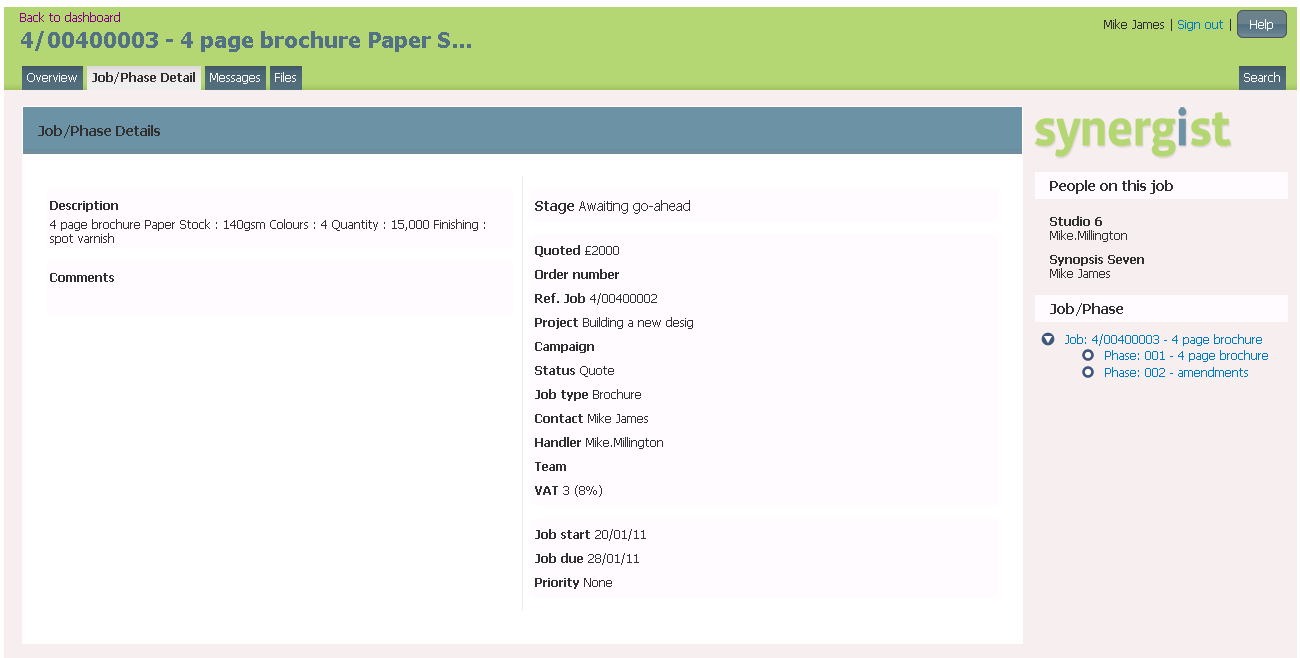
The main job details including current stage and due date are displayed. The quoted price is also shown. To the right of the main section the system displays key people involved in this job – client contacts and agency account handlers. Below the contacts is the job/phases list. You can view either the job or individual phases of the job.

Messages

A list of messages are displayed. The total number of comments posted to the message is also shown. If the user clicks on the message the original message is displayed along with a “thread” of comments.

Files

Attachments that have been uploaded by either the agency staff or by the client themselves are listed. Double clicking enables the user to download the attachment to their local machine.

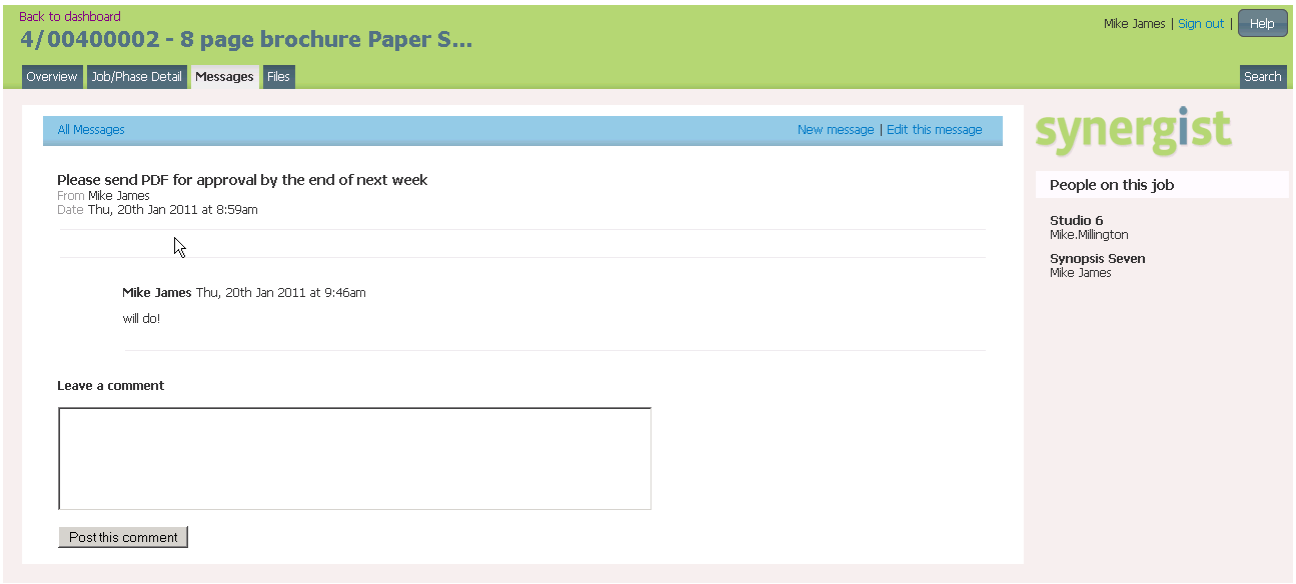


Overview tab

Messages, comments added to messages, and uploaded files are displayed

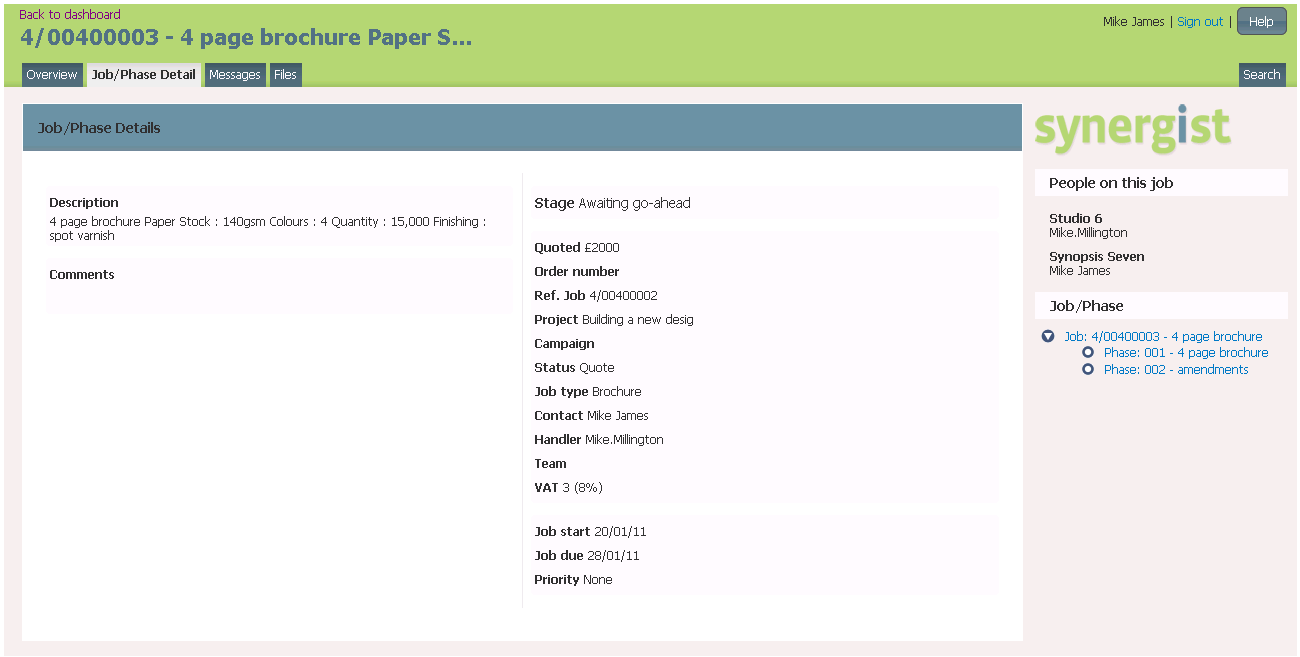
Message thread

If you click on a message or comment entry you are taken to the message thread screen. Here the original message is displayed along with any comments (the “message thread”). You can add to the thread by posting a new comment.



Job details tab

The main job details including current stage and due date are displayed. The quoted price is also shown.

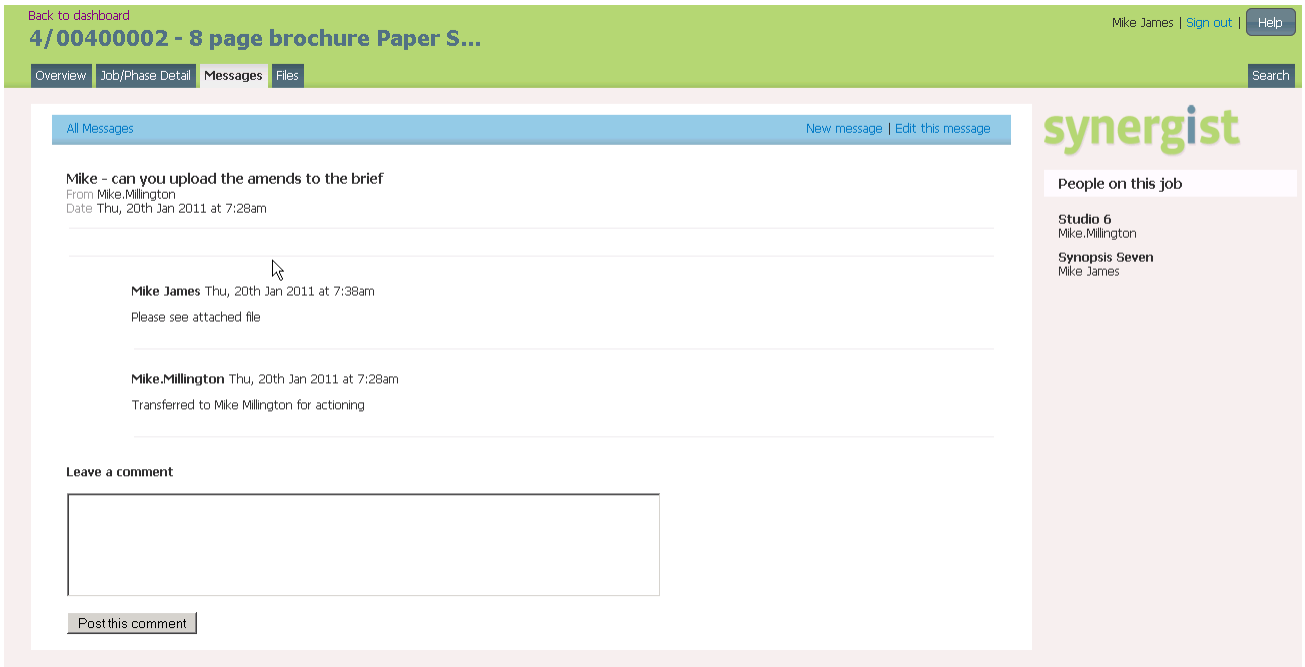


Messages tab

A list of messages are displayed. If the user clicks on the message the original message is displayed along with a “thread” of comments. The user can create a new message by clicking the “Post new message” button.

The expanded message screen

From here the user can add an additional comment to the message thread

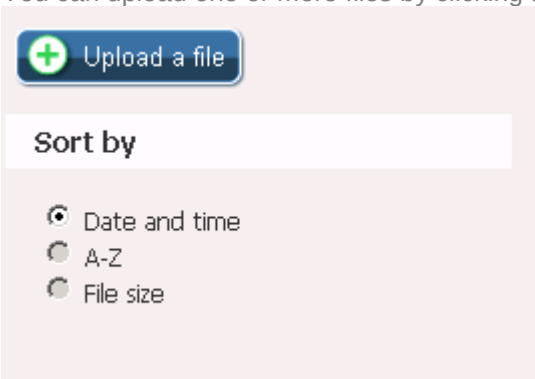


Files tab

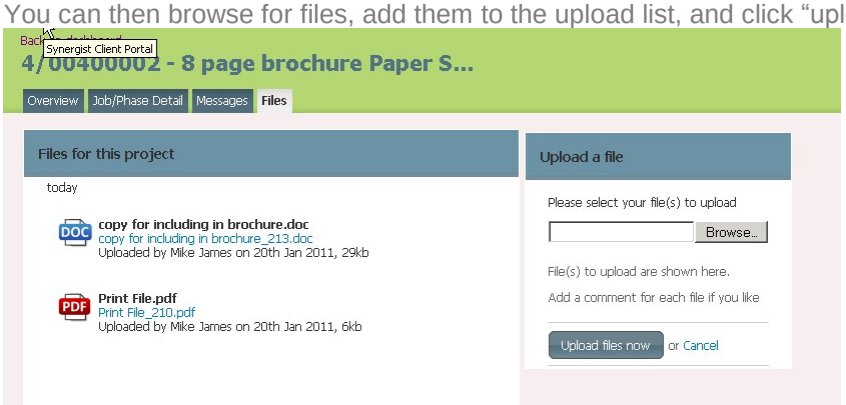
Attachments that have been uploaded by either the agency staff or by the client themselves are listed. Double clicking enables the user to download the attachment to their local machine.

Uploading a new file

You can upload one or more files by clicking the upload button

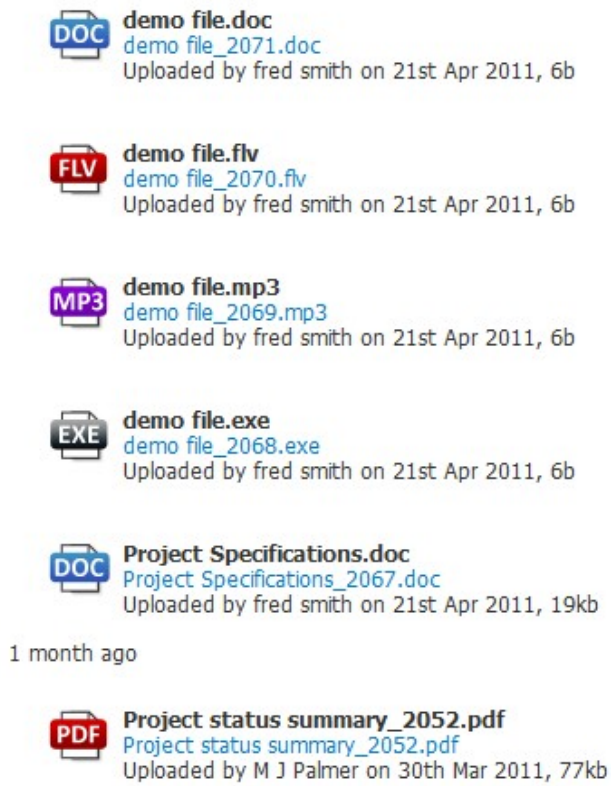


You can then browse for files, add them to the upload list, and click “upload files now”



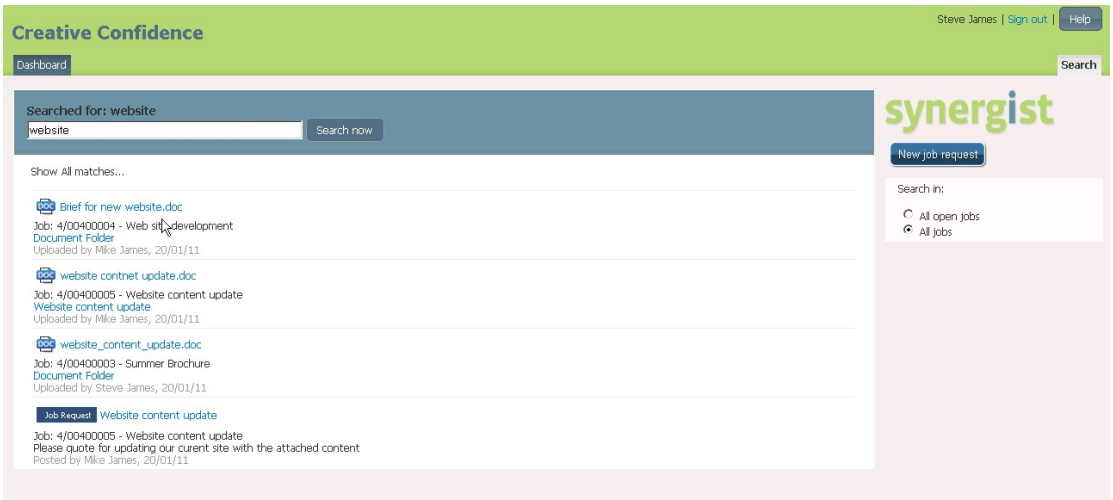
FILE TYPES – NEW ICONS

A large number of different file formats can be uploaded. Icons male it easy to identify the file types



SEARCHING

Clicking the “search” tab brings up the search screen. Simply type in a word and the system will search through messages, comments & filenames to find matches. Even closed jobs can be searched.



FINDING JOBS

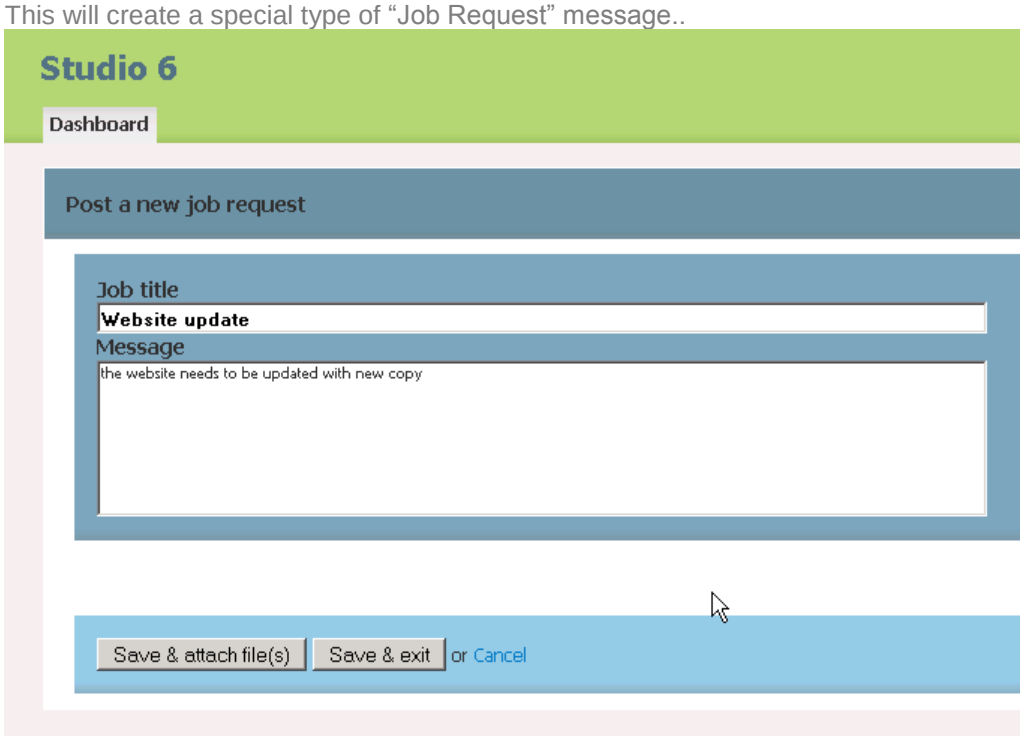
The system will also search in the job’s description / comments etc. If a match is found the job itself will be displayed against a green label.

REQUESTING A NEW JOB

To request a new job you must first navigate back to the dashboard. To do this click the Back to dashboard link ..

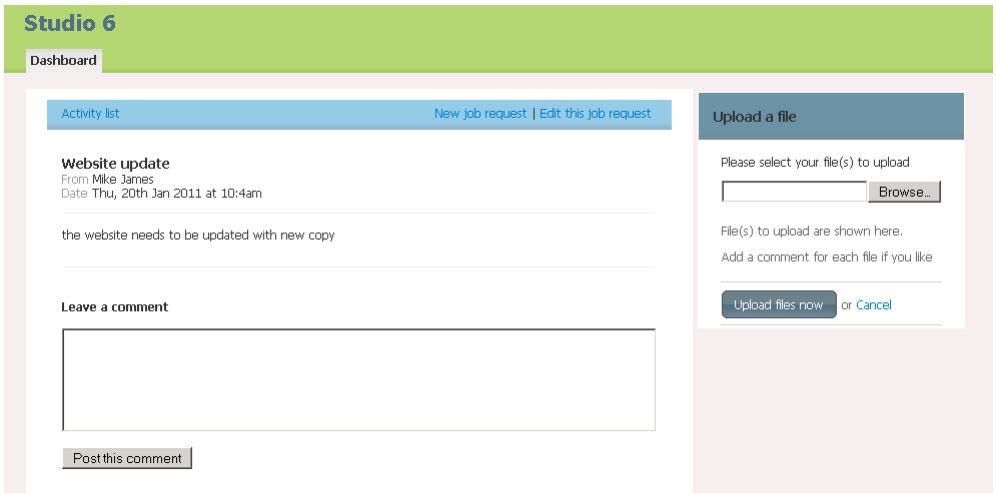
From the dashboard you can click the New job request button

This will create a special type of “Job Request” message..

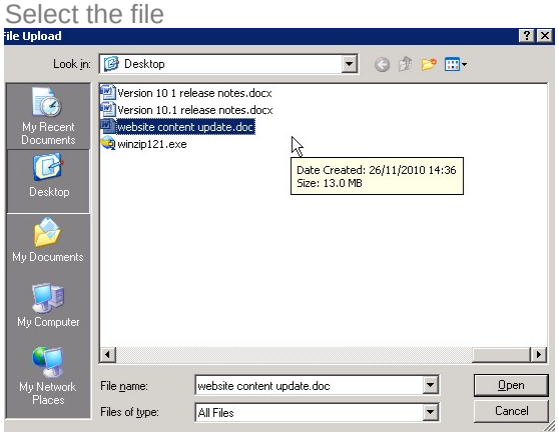


Uploading a file with the job request

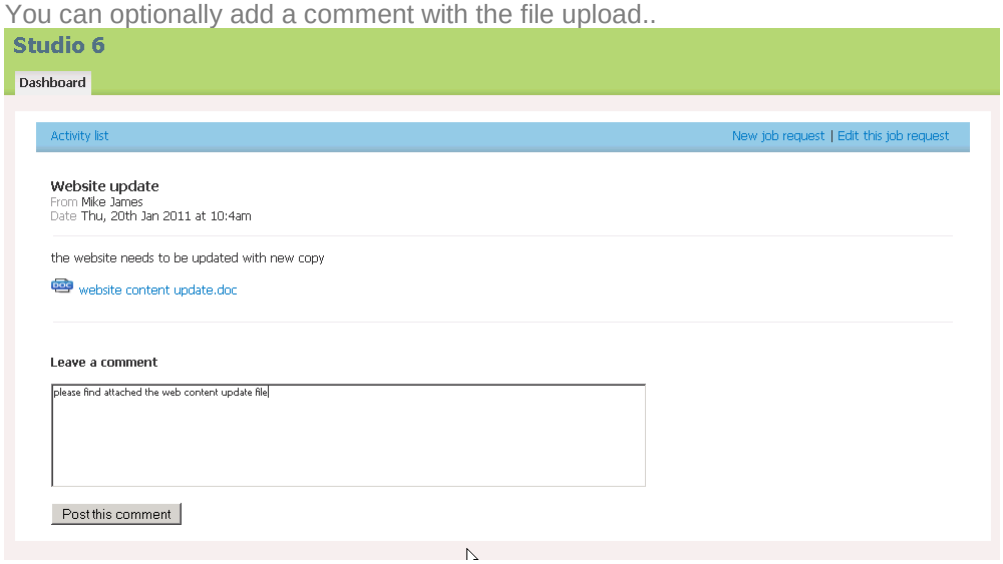
You can new either simply save the job request or request to upload an attachment.
If you select to “save & attach files” you can browse for the brief document and attach this (you can attach multiple files if you wish).



Select the file

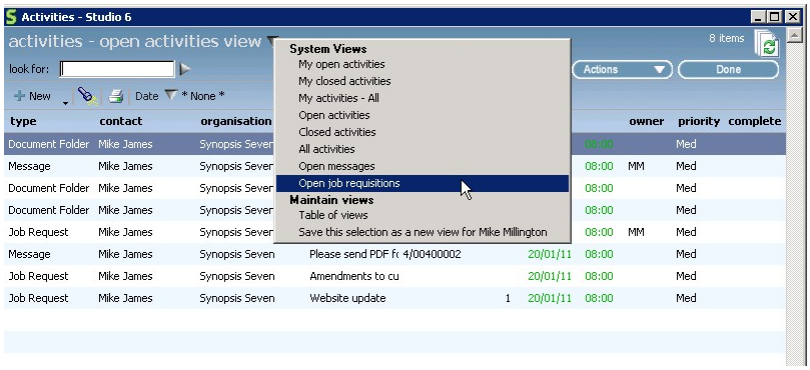


You can optionally add a comment with the file upload..

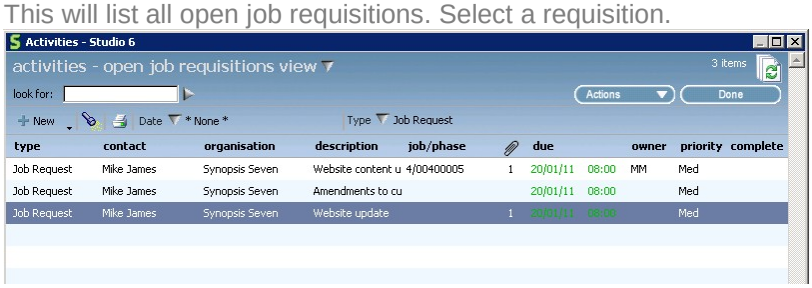


PROCESSING THE NEW JOB REQUEST

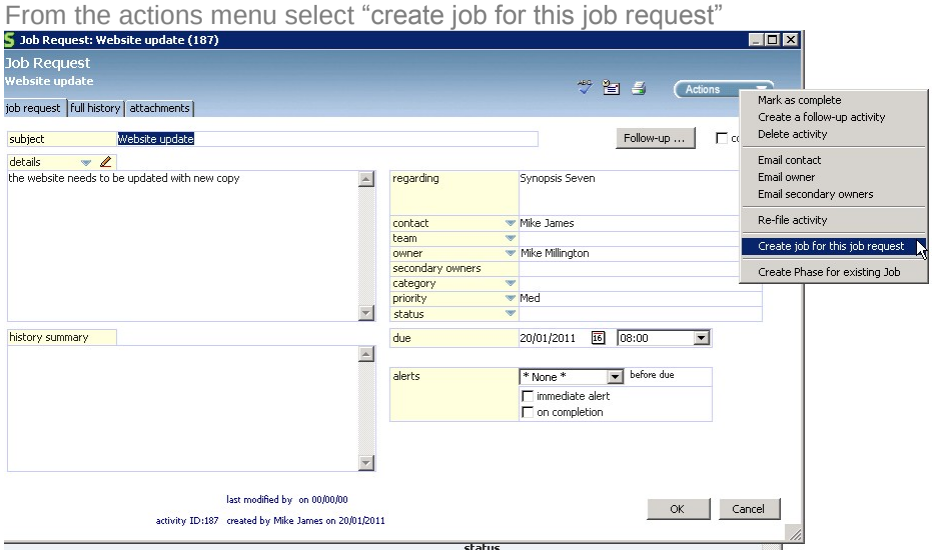
To process the new job request at the agency, using the desktop version of Synergist, the account handler will first open the activity list and select the “Open job requisitions” view.



This will list all open job requisitions. Select a requisition.

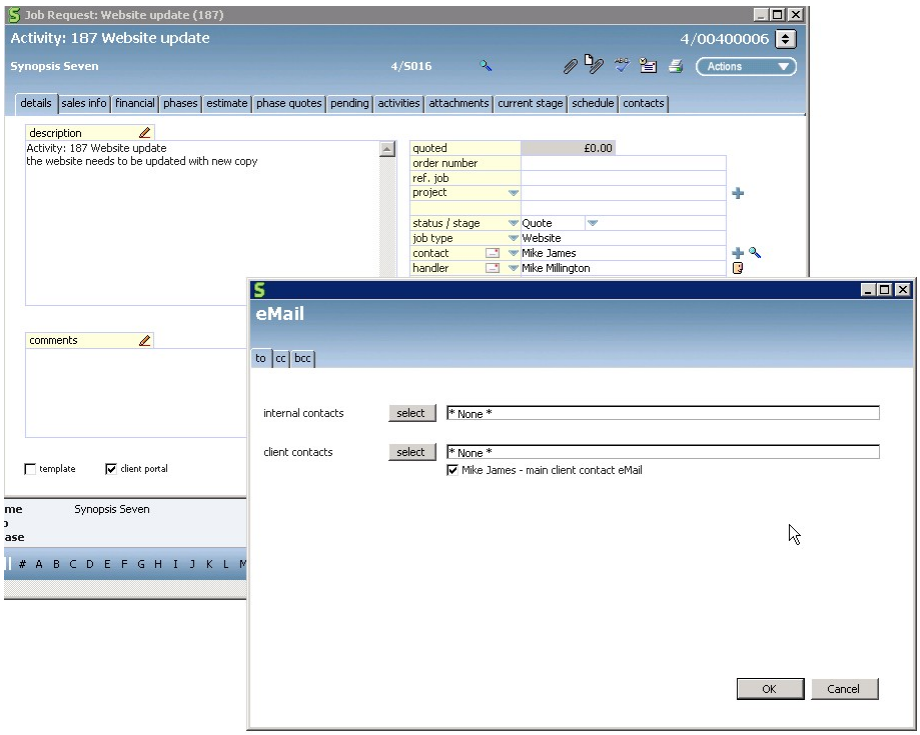


From the actions menu select “create job for this job request”



The new job

The new job will now have been created. The original brief attached to the requisition is now attached to the job. You would typically then click the “email” button and email the requester of the job to confirm the new job/quote has been created.



Viewing the job in the portal

The original requisition will no longer be displayed in the “new requisitions” area of the dashboard of the portal. Instead a new job will appear in the job list pane on the right hand side.

Lookups

Synergist has certain fields that can have an associated validation table which can be used, via a dropdown list, to validate data input. The functionality of these items has been improved and the user interface for setting them up enhanced.

ALERTS

Alerts are automatically fired off to internal staff in the following situations:

Account handler is alerted if a job request is created
The message/activity “owners” and “secondary owners” are alerted when a new message is created or if a comment is added to an existing message.

Note:

- “Owners” and “secondary owners” are the main contacts for a message or activity record. They are automatically selected based on the contacts selected for a job
- .
- Whenever a new job is created make sure you add any key contacts to the job using the “contacts” tab, in addition to the account handler and main client contact.

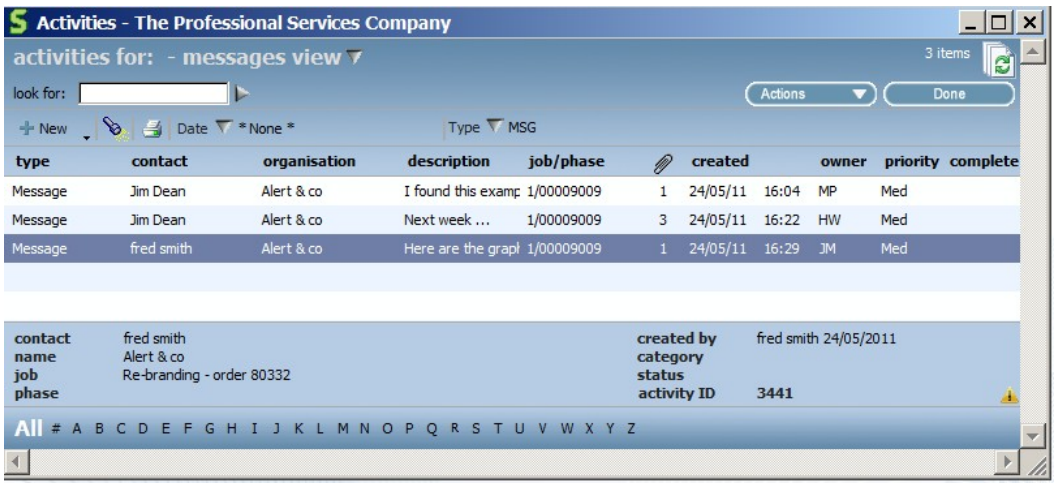
- In this example an additional client contact and two staff contacts (Type U=User) have been added to this job.

Note: we do not currently support the alerting of client contacts.

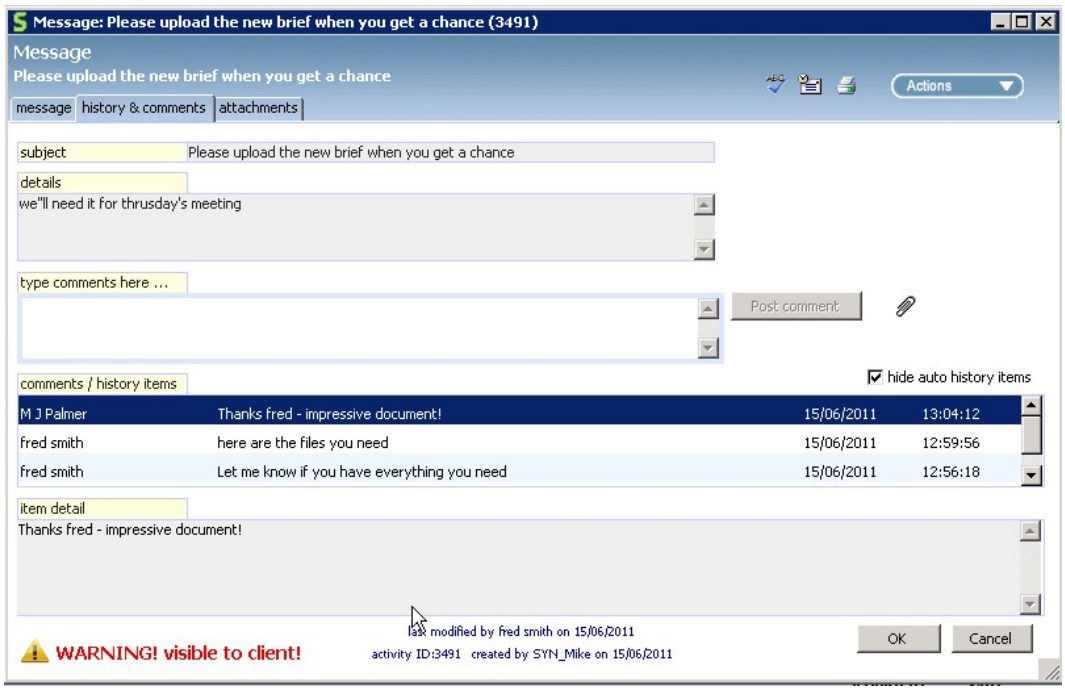
Working with the client portal from within Synergist

Standard Synergist and the Synergist staff portal have been enhanced to enable account handlers who need to interface into the client portal

Synergist has standard views for messages and job requests. These can be amended as required and set as your default view.

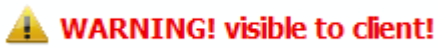


You can respond to an existing message with a comment from within Synergist or from the staff portal. Adding comments is very easy – similar to the client portal. The user just types in the text in a constantly opened text area and clicks “post comment”. To add a new message either open an existing message and use the “follow up” option, or select a job form the job list and go to the activities tab. From here you can create new messages and other activities.

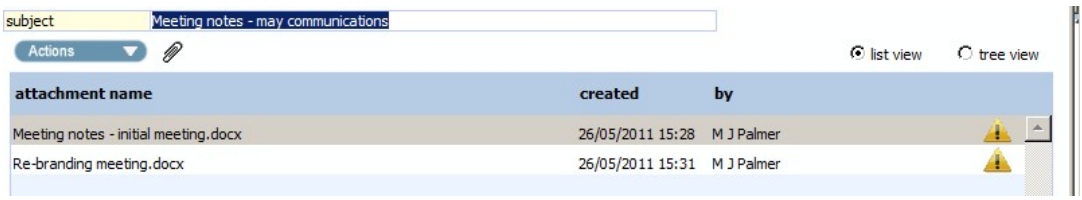


Warning signs.

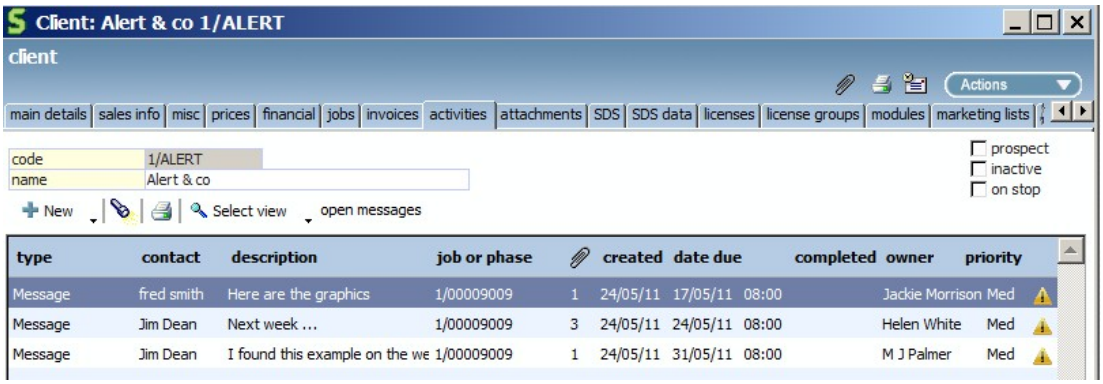
If an activity or file is visible in the client portal it is important that account handlers are aware of this in case there is any sensitive information in any of these activities or file attachments. Therefore you will see a large warning sign on the activity record:



… and a smaller version of the same icon against any attachments

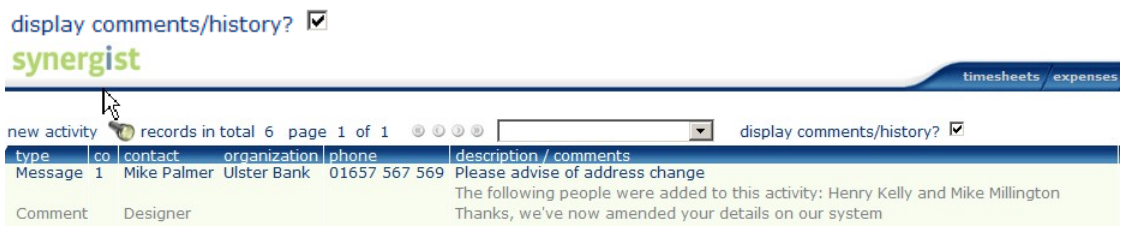


The standard "messages" view will list the messages with the most recent activity (based on the modified date) at the top of the activities list. In this way it will be easy to see which messages/comments need responding to. You can see messages from multiple companies – all in a single view. Or, if you select a client you can view messages just for that specific organization – as in this example:



Listing comments.

In the staff portal users can display comments from within the main activities list, and from within the client record – activities tab.



Visibility of activities and attachments

N v10.2 we have added more control over the visibility of activities and attachments. It is now possible to finely control what is and is not visible to your clients via the portal

Private setting

Activities have a checkbox called “private” to control whether the activity and its related attachments and history items are visible in the client portal. The default is set in file maintenance under “CRM activity types”

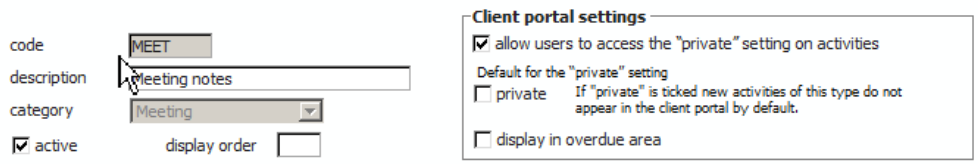
Note: If an item is marked as **[X] Private** it is hidden from the client portal

By default

- Only messages and job request activities are visible in the client portal
- Any attachments attached to these types of activities are visible by default – but can be manually hidden by checking the “private” checkbox on an attachment’s properties.

Including other types of activities in the client portal

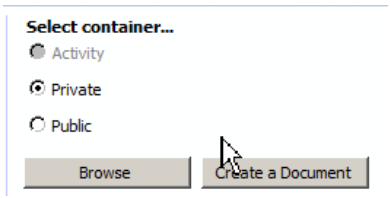
- Other activity types can be included in the portal
- For example, if you have created an activity type called “meeting notes” you could include these in the client portal if you wish.
- To include “Meeting notes” in the client portal you would select these settings in file maintenance – activity types (CRM).



- Any attachments attached to these types of activities will be visible by default in the client portal, its visibility setting is inherited from its related container – but can be manually hidden by checking the “private” checkbox on an attachment’s properties.

Note: Only “messages” and “job requests” can be generated in the client portal. However, your clients can access and amend any other type of activity that has been published to the portal.

Attaching files to jobs / phases

- New kind of container called a “public folder” has been provided. If a user of the client portal uploads a file directly to a job (i.e. not as part of a message) it will be placed in a “public folder”. Files in public folders are always visible in the client portal unless the file has been manually set not to show (see above).

- In Synergist users can decide when uploading a file whether it should be available to the client portal by selecting either a public or private folder: